



## **Key Documents Can Help With Tax Returns**

For help in completing a tax return, taxpayers are encouraged to bring certain documents to IRS offices or volunteer sites:

- Photo I.D. (valid driver's license or other photo identification)
- Social Security Cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration
- Birth dates for you, your spouse and dependents on the tax return
- Current year's tax package, if you received one
- Wage and earning statement(s) Form W-2, W-2G, 1099-R, from all employers
- Interest and dividend statements from banks (Forms 1099)
- A copy of last year's Federal and State returns if available
- Proof of Bank Routing Numbers and Account Numbers for Direct Deposit
- Total paid for day care provider and the day care provider's tax identification number (the provider's Social Security Number or the provider's business Employer Identification Number)
- To file taxes electronically on a married filing joint tax return, both spouses must be present to sign the required forms

People filing solely to receive the stimulus payment should bring proof that they have at least \$3,000 in qualifying income. This would include:

- Form SSA-1099 from Social Security or Form RRB-1099 from Railroad Retirement Board, or if 1099 is not available, a monthly statement and/or the amount of monthly benefits
- Monthly statement from the Department of Veteran's Affairs showing payments you received in 2007 for veterans' disability compensation, disability pension and survivor benefits and/or the amount of monthly benefits
- Form W-2 showing your non-taxable Qualified Combat Pay.
- Proof of any other income received, taxable or nontaxable